

IN-FLIGHT CONNECTIVITY IN CHINA, INDIA & RUSSIA - 2019



Some of the key questions answered by this report include:

- Which airlines in China, India and Russia currently provide in-flight Wi-Fi?
- How quickly will the number of connected aircraft grow over the next ten years? To what extent? (best-case/worst-case forecast scenarios and risk factors provided)
- What does the competitive landscape look like today in these markets? How will this change? Who are the key local service providers and how will these providers disrupt the in-flight connectivity value chain?
- How do cumulative connections and annual installations break down by communications technology? (ATG, L-band, Ku-band, Ka-band or Hybrid)
- How will airlines in these three markets overcome the costs of installing in-flight connectivity? Will a new business model emerge? If so, which will succeed?
- What are the barriers to entry and other considerations for international companies attempting to enter the Chinese, Indian or Russian markets?
- How will strict government legislation affect the adoption rate and operational costs of in-flight connectivity?
- What is the current and future size of the market for key in-flight connectivity hardware (in terms of revenues, unit shipments and average selling prices)?
- What are the major technological trends taking place?
- What are the key drivers and inhibitors of market growth?

>40
interviews

250
pages

4
chapters

102
tables

26
charts

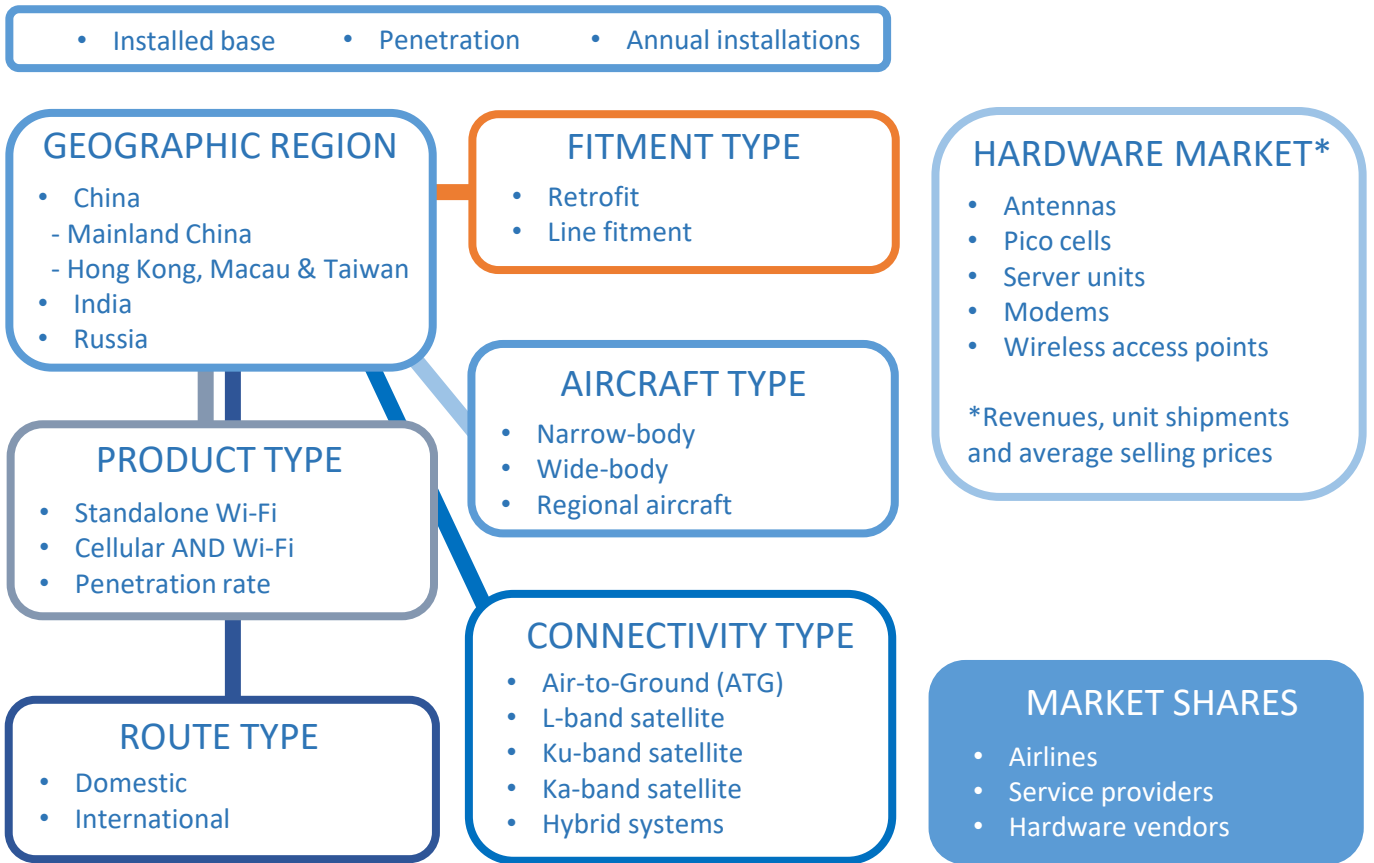


OVERVIEW

The “In-Flight Connectivity in China, India and Russia” is a new deep dive study from Valour Consultancy that sits within the firm’s highly-regarded aviation portfolio of research. Based on a period of eight months’ research and developed with input from more than 40 companies from across the value chain, this study provides an unprecedented view of the market for in-flight connectivity in three of the most challenging countries in the world – at least for global vendors.

Alongside a lengthy discussion of key drivers and inhibitors of market growth, this report quantifies annual in-flight connectivity installations, total installed base and service revenues in 2018 and provides a ten-year forecast out to 2028. Data is segmented by product type, fitment type, aircraft type, connectivity type and route type, with a full qualitative discussion of the key trends at play in support of this. In-depth company profiles of major players, both global and locally-based, are also included, along with their respective revenue market shares.

MARKET BREAKDOWN



WHAT YOU RECEIVE – KEY POINTS

- 250 pages of quantitative and qualitative analysis giving rich insight
- A dedicated write-up of the complex regulatory environment in all three markets
- Connected aircraft forecasts out to 2028, alongside robust justifications
- Full overview of the competitive environment and market trends
- 41 in-depth profiles of key companies involved in the provision of IFC in all three markets
- Dedicated analyst time from the author to answer questions you have on the study
- PDF report and Excel tables, plus an invite to an exclusive summary webinar

EXAMPLE TABLES AND CHARTS

Example Table 1
Market for Connected Aircraft in Mainland China by Frequency Band: Forecast (2018 - 2028)
 Installed Base at Year End

	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (18 - 28)
Air-to-Ground Annual Growth	0	2	3	4	5	6	7	8	9	10	11	30%
L-band Satellite Annual Growth	2	2	4	5	6	7	8	9	10	11	12	30%
Ku-band Satellite Annual Growth	3	4	5	6	7	8	9	10	11	12	13	20%
Ka-band Satellite Annual Growth	4	5	6	7	8	9	10	11	12	13	14	10%
Hybrid Annual Growth	5	6	7	8	9	10	11	12	13	14	15	5%
Total Annual Growth	14	20	25	30	35	40	45	50	55	60	65	5%

Source: Valour Consultancy

June 2019

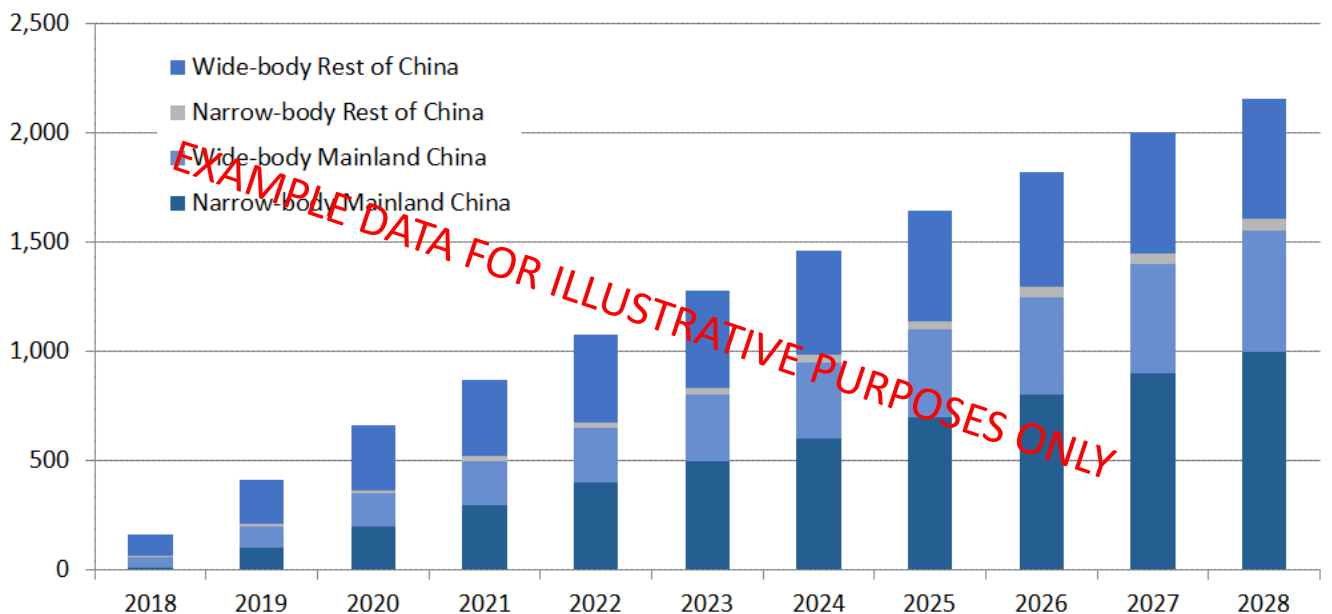
Example Table 2
Market for Connected Aircraft in India by Route Type: Forecast (2018 - 2028)
 Installed Base at Year End

	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (18 - 28)
Operating Within India Only Annual Growth	0	2	4	5	6	7	8	9	10	11	12	30%
Operating Within India and Abroad Annual Growth	2	3	4	5	6	7	8	9	10	11	12	30%
Total Annual Growth	2	5	7	9	11	13	15	19	21	23	25	52%

Source: Valour Consultancy

June 2019

Example Chart 1
Total Connected Aircraft in China (inc. Taiwan and Hong Kong) by Aircraft Type
 Connected Aircraft - 2018 to 2028



Source: Valour Consultancy

June 2019

TABLE OF CONTENTS (CONDENSED*)

EXECUTIVE SUMMARY

CHAPTER 1 – SCOPE, DEFINITIONS & METHODOLOGY

- 1.1 Introduction
- 1.2 Scope and Definitions
- 1.3 Report Content
- 1.4 Data Collection Methods and Sources
- 1.5 Exchange Rates

CHAPTER 2 – TECHNOLOGY & REGULATORY OVERVIEW

- 2.1 Introduction
- 2.2 Technical Environment
 - 2.2.1 ATG Communication Options
 - 2.2.2 Satellite Communication Options
 - 2.2.3 Future High Throughput Satellite Launches
 - 2.2.4 Next Generation Satellite Systems
 - 2.2.5 Antenna Technology & Advancements
 - 2.2.6 Modem Technology & Advancements
 - 2.2.7 Server Technology & Advancements
 - 2.2.8 WAP Technology & Advancements
 - 2.2.9 Cellular Technology
 - 2.2.10 In-Seat Power
 - 2.2.11 Standards
- 2.3 Regulatory Environment
 - 2.3.1 Key Regional Authorities and Associated Influence on IFC Adoption
 - 2.3.2 Easing of Regulation Prohibiting Mobile Phone Use in Mainland China and India
 - 2.3.3 Rules of Engagement
 - 2.3.4 Licenced Companies

CHAPTER 3 – MARKET STATISTICS AND TRENDS

- 3.1 Introduction
- 3.2 Market Drivers
 - 3.2.1 Governmental Investment/Mandates
 - 3.2.2 Large Fleets of Unconnected and Untapped Aircraft
 - 3.2.3 Production of Next Generation Aircraft and Line-Fit Approvals
 - 3.2.4 Lighting Up Foreign Aircraft
 - 3.2.5 Smartphone Technology
 - 3.2.6 Merging of IFE and IFC
 - 3.2.7 Improved Business Model
 - 3.2.8 Air-to-Ground
 - 3.2.9 Quality of Service
- 3.3 Market Inhibitors
 - 3.3.1 Sovereignty
 - 3.3.2 Inexperienced MRO Network
 - 3.3.3 Flight Times
 - 3.3.4 Boeing 737 MAX
 - 3.3.5 Poor Marketing & Lack of Passenger Awareness
 - 3.3.6 Negative Experience/Perception of IFC
 - 3.3.7 Cost of IFC
- 3.4 Market Estimates and Forecasts
 - 3.4.1 Market for In-Flight Connectivity in China, India and Russia
 - 3.4.2 China
 - 3.4.2.1 Market for Connected Aircraft by Geographic Region
 - 3.4.2.2 Market for Connected Aircraft by Product Type
 - 3.4.2.3 Market for Connected Aircraft by Fitment Type
 - 3.4.2.4 Market for Connected Aircraft by Aircraft Type
 - 3.4.2.5 Market for Connected Aircraft by Frequency Band
 - 3.4.2.6 Market for Connected Aircraft by Route Type
 - 3.4.2.7 IFC Hardware Market in Mainland China, Hong Kong and Taiwan
 - 3.4.2.8 Positive And Negative Forecast Factors
 - 3.4.3 India
 - 3.4.3.1 Market for Connected Aircraft by Product Type
 - 3.4.3.2 Market for Connected Aircraft by Fitment Type
 - 3.4.3.3 Market for Connected Aircraft by Aircraft Type
 - 3.4.3.4 Market for Connected Aircraft by Frequency Band
 - 3.4.3.5 Market for Connected Aircraft by Route Type
 - 3.4.3.6 Indian IFC Hardware Market
 - 3.4.3.7 Positive And Negative Forecast Factors
 - 3.4.4 Russia
 - 3.4.4.1 Market for Connected Aircraft by Product Type
 - 3.4.4.2 Market for Connected Aircraft by Fitment Type
 - 3.4.4.3 Market for Connected Aircraft by Aircraft Type
 - 3.4.4.4 Market for Connected Aircraft by Frequency Band
 - 3.4.4.5 Market for Connected Aircraft by Route Type

- 3.4.4.6 Russian IFC Hardware Market
- 3.4.4.7 Positive And Negative Forecast Factors
- 3.4.5 Service Revenues in China, India and Russia
- 3.5 Associated Tables and Charts
 - 3.5.1 China
 - 3.5.2 India
 - 3.5.3 Russia
 - 3.5.4 Consolidated Service Revenues

CHAPTER 4 – COMPETITIVE ENVIRONMENT

- 4.1 Company Profiles
 - 4.1.1 Chinese Based
 - 4.1.1.1 Air Esurfing Information Technology Co., Ltd
 - 4.1.1.2 APT Satellite Co., Ltd.
 - 4.1.1.3 Asia Satellite Telecommunications Co., Ltd
 - 4.1.1.4 China Transport Telecommunication Information Group Co. Ltd
 - 4.1.1.5 China Mobile Communications Corporation
 - 4.1.1.6 China Satellite Communications
 - 4.1.1.7 China Telecom Satellite
 - 4.1.1.8 China United Network Communications Group Co., Ltd
 - 4.1.1.9 Commercial Aircraft Corporation of China, Ltd
 - 4.1.1.10 Donica
 - 4.1.1.11 FTS Technologies Inc.
 - 4.1.1.12 TD-Link
 - 4.1.2 Indian Based
 - 4.1.2.1 Antrix Corporation Ltd.
 - 4.1.2.2 Bharat Sanchar Nigam Ltd. (BSNL)
 - 4.1.2.3 Bharti Airtel
 - 4.1.2.4 Hughes Communications India Ltd.
 - 4.1.2.5 Indian Space Research Organisation
 - 4.1.2.6 Reliance Jio
 - 4.1.3 Russian Based
 - 4.1.3.1 Altegrosky
 - 4.1.3.2 Gazprom Space Systems
 - 4.1.3.3 Russian Satellite Communications Company
 - 4.1.3.4 Sputnik Telecommunications Entertainment Company
- 4.1.4 Global Companies
 - 4.1.4.1 Airbus SE
 - 4.1.4.2 Astronics Corporation
 - 4.1.4.3 Boeing Company
 - 4.1.4.4 Collins Aerospace
 - 4.1.4.5 Eutelsat Communications
 - 4.1.4.6 Gilat Satellite Networks
 - 4.1.4.7 Gogo Inc.
 - 4.1.4.8 Honeywell Aerospace
 - 4.1.4.9 Inmarsat plc
 - 4.1.4.10 Intelsat Corporation
 - 4.1.4.11 Kontron S&T AG
 - 4.1.4.12 Newtec
 - 4.1.4.13 Panasonic Avionics Corporation
 - 4.1.4.14 SES S.A.
 - 4.1.4.15 SITAONAIR
 - 4.1.4.16 SmartSky Networks
 - 4.1.4.17 Thales Group
 - 4.1.4.18 Viasat, Inc.
 - 4.1.4.19 VT iDirect
- 4.2 Business Models
 - 4.2.1 Costs of Providing In-Flight Connectivity
 - 4.2.2 Ancillary Revenue Potential
 - 4.2.3 Cost Savings
 - 4.2.4 Strategies of Selected Market Participants
 - 4.2.5 Strategies of Airlines
- 4.3 Market Shares
 - 4.3.1 China
 - 4.3.2 Russia

APPENDIX 1 – COMPANY DIRECTORY

APPENDIX 2 – ACRONYM AND ABBREVIATION LIST

APPENDIX 3 – LIST OF TABLES, CHARTS AND FIGURES

***A more detailed table of contents is available on request.**



ABOUT VALOUR CONSULTANCY

Valour Consultancy is a UK-based provider of market intelligence services. Founded in 2012, the company has grown rapidly and is renowned for the extremely high-quality of its research and consultancy. Having firmly established itself in the aviation space, where many of the leading players rely on its expert insight and analysis, Valour Consultancy has successfully expanded into a number of other markets including, maritime, industrial, drones and body-worn cameras.

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